BECOMING A RE-ORG COACH

How to plan and lead a workshop to implement a storage reorganization

BECOMING A RE-ORG COACH: HOW TO PLAN AND LEAD A WORKSHOP TO IMPLEMENT A STORAGE REORGANIZATION

This publication has been developed thanks to a partnership between the Canadian Conservation Institute (CCI), the Royal Institute for Cultural Heritage (KIK-IRPA) and ICCROM (International Centre for the Study of the Preservation and Restoration of Cultural Property).

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SPECIAL ACKNOWLEDGEMENT

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Foreword

In September of 2019, ICOM's (International Council of Museums) 34th General Assembly adopted a resolution to safeguard and enhance collections in storage around the world. This issue, which had been lingering for decades, was finally recognized by the entire professional community so that it could be addressed openly and optimistically.

All over the world, museums are struggling to provide access to their growing collections in storage and to use these incredible resources to engage their communities. With over 55,000 museums worldwide, the needs are immense and require expanded capacities to address them.

In response to this need, ICCROM created the RE-ORG Method. Developed ten years ago, thanks to the support of UNESCO, it now exists in six languages, and it continues to be used by new museums each year. Since its launch, more than 1,000 professionals worldwide have participated in RE-ORG training activities. Depending on the context, these have varied in length and modality, but have always included a practical storage reorganization implementation in a real museum.

Canada, Belgium, Chile, India, Serbia, and Nigeria adopted (and adapted) the RE-ORG Method to serve their large constituencies by developing national or regional training strategies. In so doing, they acquired hands-on experience and a wealth of insights that they want to share with other institutions, associations and museums worldwide. This is the purpose of this publication. It has been prepared by Simon Lambert from the Canadian Conservation Institute (CCI) and Marjolijn Debulpaep from the Royal Institute for Cultural Heritage (KIK-IRPA) in Belgium, in collaboration with other international colleagues.

It focuses on that final phase of the RE-ORG Method, providing guidance and tips for its successful implementation. Institutions and heritage professionals around the world who wish to learn more about the RE-ORG Method can gain behind-the-scenes insight into the making of a practical 3-5-day workshop, with illustrations and real-world examples from peers. Fundamentally, RE-ORG is about learning from each other and developing a strong, practical and resourceful network.

ICCROM thanks the two authors, and behind them, the Canadian Conservation Institute (CCI) and the Royal Institute for Cultural Heritage (KIK-IRPA) for this new and generous contribution to existing RE-ORG resources.

Webber Ndoro
Director-General, ICCROM

Preface

As the RE-ORG Method becomes more widely known, there is a growing interest in practical RE-ORG training in the museum community. In our respective national training strategies (Canada and Belgium), we adopted a blended learning approach. We challenged participants to tackle their own storage issues by working on a project in their museum over a one-year period, providing distance or in-person support when needed. We combined this with a practical activity in which all participants work together to reorganize storage in an external host museum.

Twenty-three museums participated in RE-ORG Canada (47 professionals) and 21 museums participated in RE-ORG Belgium (43 professionals). Over and over again, they told us that they valued the hands-on training the most. After having practiced the implementation as a team (Phase 4 of RE-ORG), we definitely saw a change in their confidence level. They were able to deal with the various types of bottlenecks that can occur, they saw how long certain tasks take, they managed their time, built consensus and communicated with others, and they saw how everyone had something to learn from someone else. As a result, they were much more prepared for the last phase of RE-ORG, which can be very intimidating.

This is why this guide is about planning and leading a workshop that focuses on the Implementation phase of RE-ORG. We are calling the workshop leader a "coach" because we envision them encouraging and motivating participants to develop their own solutions and to make their own decisions by asking questions and providing feedback. Coaches create the opportunity and the supportive environment that allows the participants to "learn by doing".

To all future RE-ORG coaches, we wish you the best of luck in leading your first RE-ORG workshop!

Simon Lambert
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Glossary

BOTTLENECK: Task or situation within a mini-project that, until it is resolved, can delay the progress of other mini-projects.

COACH: Plans and leads the RE-ORG workshop. They may sometimes be assisted by team leaders. They could be external consultants hired by the organizer or be part of its staff (e.g. museum advisor working for a museum association). Coaches are there to support the work of the participants and lead them to success.

CONTACT PERSON: Staff member from the host museum who is familiar with the collection (e.g. collections manager, a curator, or director) and who will help the coach plan the workshop.

HOST MUSEUM: The museum where the RE-ORG workshop is held. Meets the basic requirements for hosting a RE-ORG workshop (see p.11) and has a staff member ("contact person") who is familiar with the collection such as a collections manager, a curator, or director.

MINI-PROJECT: A planning tool that helps the coach to break down the bigger RE-ORG project into smaller, more manageable groups of interrelated tasks. Mini-projects are usually divided by object category (e.g. rolling textiles, rehousing uniforms in boxes, rehousing long and thin objects) or by location (e.g. prepare basement to accommodate non-collection items, convert closet into prop storage).

OBJECT CATEGORIES: Object grouping based on similar storage solutions and / or handling requirements. These are the "12 RE-ORG object categories" from the ⚙ RE-ORG Workbook (See Phase 2, step 7).

OBJECT TYPES: Object grouping focusing on what the objects are, e.g. books, textiles, paintings, glassware, ceramics, agricultural implements, sculpture.

ORGANIZER: Initiates the development of the RE-ORG hands-on workshop. The organizer can be a museum association, another type of professional association, a museum that wishes to host and organize an activity benefiting other institutions, or a national or regional conservation institute or centre. The organizer may have partners or sponsors, and sometimes, the coach is part of their staff.

PARTICIPANTS: Those who take part in the hands-on RE-ORG workshop. Ideally they work in (or with) a museum that needs a RE-ORG project, and they have collections care experience. Preferably, they would have basic knowledge of RE-ORG Phases 1-3 before the workshop.

RE-ORG PROJECT: The storage reorganization project, as defined by the coach in collaboration with the host museum, that will be implemented by the participants during the workshop.

RE-ORG METHOD: Structured around 4 phases: 1) Getting started, 2) Storage condition report, 3) Storage action plan, and 4) Storage reorganization implementation. Includes the Self-evaluation Tool, Workbook, Worksheets and Additional Resources.

RE-ORG TRACKING CHART: Planning tool used to keep track of the progress of smaller teams during the workshop. It also facilitates communication between the teams and helps participants manage their tasks and their time on their own. See RE-ORG Additional Resources - "Resource 14 - Simple steps to creating a RE-ORG tracking chart".

RE-ORG WORKSHOP *(i.e. workshop to implement a storage reorganization)*: A 3-5 day training activity that focuses on Phase 4 of RE-ORG (Implementation). This workshop is designed to give participants the necessary skills, confidence and motivation to launch a RE-ORG project of their own.

SMALLER TEAMS: These are teams of participants, usually 2-6 people, that are all working on the same mini-project. Usually smaller teams will have a team leader.

TEAM LEADERS: They work within (and coordinate the work of) a smaller team, liaising with the coach. Team leaders may have practical RE-ORG experience, or skills relevant to the work of the smaller teams (practical experience with certain object types, carpentry, conservation background, etc.). Like the coach, they should have good time management, problem solving and communication skills.

Introduction

The RE-ORG Method: a refresher

The RE-ORG Method is a step-by-step approach to help those who work with cultural collections to reorganize their storage rooms, focusing on the creative, yet safe, use of existing resources. The Method has four phases:

1 **PHASE 1 | Getting started:**
Create the best possible conditions for a successful storage reorganization.

2 **PHASE 2 | Condition report:**
Document the current state of storage to identify major issues affecting the collections.

3 **PHASE 3 | Action plan:**
Define the necessary tasks and establishing a project timeline.

4 **PHASE 4 | Implementation:**
Implement the action plan.

What it means to be a RE-ORG Coach

MY OBJECTIVE AS A COACH:

- Successfully implement the storage reorganization in the host museum.
- Provide an opportunity for participants to work in a team and practice a RE-ORG Implementation before they launch into their own project.

CONTEXT	MY EXPERIENCE	MY SKILLS	MY KNOWLEDGE	MY PERSONAL QUALITIES
• No prior knowledge of the host museum, how it operates or its collection. • No prior knowledge of the participants.	• Applied the RE-ORG Method (Phases 1-4). • Worked on practical collections care projects. • Lead a team in a hands-on project.	• Leadership • Time management • Estimating space • Project management • Problem solving • Communication	• RE-ORG Method • General health and safety • Storage solutions for different types of collections • Familiarity with risk assessment • Handling and packing collections	• Creative / innovative • Motivating • Collaborative • Flexible / adaptable • Conscientious

Why a guide about "workshops to implement a storage reorganization"?

Over the past 10 years, RE-ORG training initiatives have taken multiple forms, from international to regional or national, spanning from a few days to 15 months. While Phases 1 to 3 have been taught online or in face-to-face workshops, Phase 4 (Implementation) requires practical, face-to-face training.

This guide focuses on this practical training and the preparatory work the coach must do to make it a success. The objective is to ensure that participants gain hands-on experience working on real storage rooms and a real collection (i.e. the host museum) before they start reorganizing their own storage. The RE-ORG workshop is a 3-5 day project that aims to restore immediate access to a collection.

The RE-ORG Implementation phase (Phase 4) involves making decisions about whether or not objects are part of the collection, working as part of a team, moving collections, negotiating and deciding how best to store certain objects, building custom storage solutions or adapting existing units, as well as managing time, people and resources. This can be very daunting to many museums. Therefore, it can be very valuable for museum professionals to practice this phase in a safe environment before trying it out in their own institution.

An organizer may want to create this kind of opportunity for institutions and professionals who are facing similar storage challenges and could benefit from a practical learning activity in a group setting. As a RE-ORG coach (hired by organizer or part of its staff), you must plan and lead the workshop.

For this guide, we have set a few parameters:
* The workshop takes place over 3-5 days;
* The host museum is a small to medium-sized museum;
* There are 15-20 participants.

Of course these parameters can vary, and you will need to adapt the advice found in this guide to your own situation or context.

About this guide

We have structured this guide to coincide with the various planning phases of a RE-ORG workshop: before, during and after the workshop.

Before the workshop

During the workshop

After the workshop
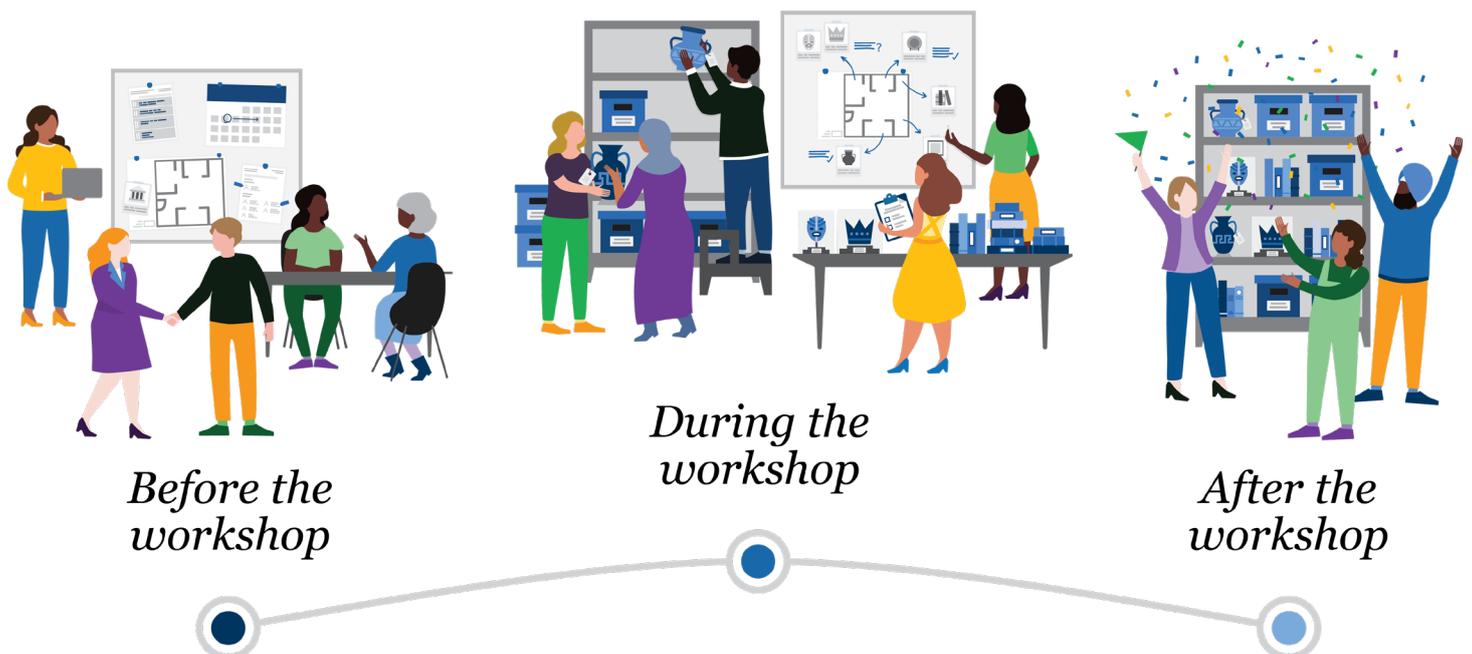
Throughout this guide, you will find boxes that provide additional thinking tools or information about specific topics. As we have been involved in organizing several of these workshops in various countries, we also wanted to share, through personal accounts and stories, the challenges past coaches have faced and how they overcame them.

Symbols you will find throughout this guide:

Thinking tools and information

Ideas

Stories, anecdotes and advice from past RE-ORG coaches

Important notes

Reminders

Coach's toolbox
(https://tinyurl.com/w4wrv3l)

If participants want to make the most of the practical workshop, they should be as familiar as possible with the RE-ORG Method. They should read the workbook, the worksheets and the additional resources, and familiarize themselves with other RE-ORG projects on the RE-ORG International YouTube channel or on the RE-ORG portal. If possible, they should implement Phases 1-3 in their own context, or at least start Phase 2 and reflect on their own storage. Depending on the participants' level of RE-ORG knowledge, you could decide to incorporate an introduction to RE-ORG Phases 1-3 in your workshop as a 1- to 2-hour session and / or give them assignments beforehand.

See Coach's toolbox for *"0.1 - Examples of 'Introduction to RE-ORG' didactic material"*.

As a coach, you will have to manage participants' expectations. A RE-ORG workshop is very different from a RE-ORG project led by a small team in their own institution. The quick and impressive results of a RE-ORG workshop are only possible because there are more people working simultaneously and uninterrupted: a 3-day workshop with 20 participants working 6 hours per day is equivalent to 360 person hours. If the same project were to be implemented in a museum that can allocate two staff to it, it would take 30 full days of work (or 6 consecutive weeks). However, most museums would have to fit the project in their overall planning and extend the implementation over many months. Furthermore, the participants do not see all the preparatory work that goes into planning the workshop.

1. Before the workshop

1.1 Selecting the host museum

As a coach, you could be involved in selecting the host museum. Identifying the right host museum and the right kind of project is important to ensure the workshop's success. You want a project that is feasible, that is didactically valuable (i.e. many different types of problems and solutions to develop), that is motivating (i.e. a powerful "before" and "after" comparison), and that includes enough mini-projects to keep people busy for the duration of the workshop. We have provided below a list of key requirements to consider in selecting a host museum.

As a coach, you have practical RE-ORG experience, so we always recommend that organizers discuss host museum options with you.

To show potential hosts what a RE-ORG workshop could look like in practice, send them videos of past RE-ORG workshops and the RE-ORG Fundamentals: Introduction to the RE-ORG Method video.

Basic requirements to host a RE-ORG workshop: A checklist for organizers

☐ About 1 or 2 storage rooms that could be part of the project. These should measure around 80 m² / 850 ft² each (i.e. 300 to 5,000 objects total) and should include a variety of object types and sizes to allow the coach and participants to find different storage solutions.

☐ Working spaces (called "swing spaces" in RE-ORG) near the storage rooms for doing practical work and for temporarily accommodating the collection. This is needed because it is usually required to remove at least part of the objects from storage to reconfigure the space. These spaces can sometimes be meeting rooms, training rooms or gallery spaces, which can be closed off to other users during the workshop.

☐ A space away from collections where participants can leave their personal belongings and have coffee breaks and lunches (at least 40 m² / 430 ft²).

☐ Photographic documentation illustrating the storage condition.

   See Coach's toolbox for *"1.1 - Illustrating a museum"* template.

☐ Demonstration of the museum director's interest and support of the RE-ORG project, including the assignment of one contact person (i.e. collections staff member in a decision-making role) who can work with the coach at key moments to plan the workshop (about 4 to 6 months leading up to the workshop) and during the workshop itself, and an agreement to grant all participants access to the storage rooms and permission to work hands-on with the collections for the duration of the workshop.

   See Coach's toolbox for *"1.2 - Letter of support"* template.

☐ Details about the availability of facility or maintenance staff before or during the workshop to assist with moving large and heavy objects, to carry out general handy work (e.g. installing or adapting storage units, carpentry) or basic electrical work (e.g. relocating light fixtures).

☐ Possible dates that would be convenient to host the hands-on workshop and for a site visit by the coach.

For a successful workshop, the host museum staff should be engaged and enthusiastic. Many museums can be "open" to the idea of hosting a RE-ORG workshop, but if they are not excited by the idea or truly engaged, it can be difficult to get them to reserve some time to work on the planning during the 4-6 months leading up to the workshop.

Choosing a host museum that has many non-collection items in storage will appear challenging to the participants and produce an impressive "before and after," which will be motivating for them and it will free up a lot of space for the collection. Likewise, developing storage solutions where you recycle materials and adapt existing storage furniture is also motivating, as it shows what can be achieved with very little.

"When I select a host museum, I look for one with multiple problems: lack of furniture, non-collections in storage, objects excessively piled on shelves, heavy objects that are difficult to move, blocked corridors, objects on the ground, etc. It is a perfect teaching environment as it allows participants to tackle all of them."

"One of the workshops I coached was a success because I already knew the curator and registrar, which made it easy to engage them and to build trust and enthusiasm. Another less successful experience was with a host museum that had a very hierarchical organizational culture. This created a lot of barriers to accomplishing the practical work (even for an otherwise simple project): mistrust of the coaches, hesitation from staff on making decisions, and a complex approval process. Somewhere between these two examples, another host museum had no idea what RE-ORG was initially, but my team and I worked with them for a few months to do all the preparatory work. Armed with positivity and enthusiasm, we eventually gained their trust and their engagement in time for the workshop. So, sometimes you have to be prepared to cultivate the relationship with the host, because depending on the context, hosts may be reluctant to have external people working with their collection."

"A host museum did not have an additional room that we could use as a swing space. We thought this would be a major challenge, but it worked well since we moved the entire collection from one room into another without requiring intermediary storage. However, to do some of our collection rehousing and collection inspection work, we had to set up tables in the hallway. At other times, we have simply converted exhibition rooms into temporary swing spaces when needed."

"For many small museums, which make great RE-ORG hosts, I assume there is no budget at all, and I like finding inventive ways to recycle materials. Sometimes, when we start working on the workshop preparation, it catches the attention of upper management and magically, funds are made available for the project."

How complex is this project? (Is it a good fit for a RE-ORG workshop?)

Assuming that the host museum options being considered all meet the "Basic requirements to host a RE-ORG workshop", here is a list of questions that the coach can ask of each potential host to better understand the complexity of the project, hence, of the workshop itself. Some of this information can also be found by speaking with the organizer, by looking at the completed Self-evaluation tool, by looking at photos and videos submitted by the potential host, or by looking at their completed *"1.1 - Illustrating a museum"* template (See Coach's toolbox).

We recommend that you fill one of these forms for each host museum option you are considering. For each row, check the box containing the option that best matches the host museum's situation (either green, yellow, red). As RE-ORG workshops have a compressed timeline (3-5 days), we advise you – at least in the beginning – to choose a host museum where most checkmarks are in the "simpler project" (green) column.

COMPLEXITY FACTORS	SIMPLER PROJECT	SOMEWHERE IN THE MIDDLE	MORE COMPLEX PROJECT
Contact person from host museum is able to determine what is collection and non-collection	☐ YES	☐ SOMEWHAT	☐ NO

COMPLEXITY FACTORS	SIMPLER PROJECT	SOMEWHERE IN THE MIDDLE	MORE COMPLEX PROJECT
Number of curators responsible for the collection targeted by RE-ORG	☐ 1	☐ 2	☐ More than 2
Building (particularly storage rooms) in overall good condition	☐ YES – no renovations to be done	☐ MOSTLY – a few minor renovations could be done, but are not critical	☐ NO – several renovations must be undertaken
Storage rooms are in the same facility	☐ YES – all in the same facility (or: offsite storage is excluded from this project)	☐ NO – but the storage rooms are walking distance from main facility	☐ NO – and offsite storage rooms are driving distance from main facility
Storage rooms are on the same floor	☐ YES	☐ NO – but the path from one floor to another is free from obstacles	☐ NO – and the path from one floor to another has many obstacles
Number of storage rooms and surface area	☐ Project is limited to 1 or 2 storage rooms (80 m² / 850 ft² each), regardless of total number of storage rooms in the museum	☐ Project includes 3 to 5 storage rooms (80 m² / 850 ft² each)	☐ Project includes 6 or more storage rooms (80 m² / 850 ft² each)
There are items that are particularly difficult to move: extra heavy or voluminous collection / non-collection items; especially fragile or complex	☐ NO – all items are fairly easy to manipulate	☐ YES – but only a few and they can be moved fairly easily with existing equipment or staff	☐ YES – and there are several large pieces that will require external help (e.g. movers)
The collection is dispersed (i.e. objects in same category spread throughout various spaces in the building)	☐ NO – collection dispersion is minimal	☐ SOMEWHAT – the collection is a little dispersed	☐ YES – the collection is highly dispersed
There are sufficient rooms that can be converted into collection support spaces (i.e. non-collection storage, education collection storage, processing area, documentation room, etc.), if required	☐ YES – or not required		☐ NO – but required
Number of objects part of the RE-ORG project	☐ Less than 1,000	☐ Between 1,000 and 5,000	☐ 5,000 or more

Based on a tool developed by Gaël de Guichen (2018)

See [Coach's toolbox](#) for a printable version of *"1.3 - How complex is this project?"*.

COMPLEXITY FACTORS	SIMPLER PROJECT	SOMEWHERE IN THE MIDDLE	MORE COMPLEX PROJECT
There is a functional location system (i.e. each shelf, drawer and rack has a location code)	☐ NO – there is no location system, or there is one, but it is not functional; object locations can be completely disregarded during the RE-ORG and the inventory can be done afterwards	☐ SOMEWHAT – there is a functional location system in only one of the spaces, or shortcuts can be taken (e.g. tracking objects in groups, for instance, by shelf)	☐ YES – there is a functional location system and the location changes of each individual object must be tracked throughout the RE-ORG project
There is sufficient free space inside units to rehouse objects located on the floor and outside storage	☐ YES – once non-collection items are removed and objects are sorted by category, there will be enough room for these objects inside existing units	☐ YES – but we may have to buy units to accommodate these objects; there is enough floor space to accommodate the new units	☐ NO – and floor space seems insufficient to accommodate new units
Quantity of units to purchase and assemble	☐ NONE – can reuse existing units as they are, or only a few new ones need to be assembled (of the same type)	☐ SOME – must adapt a few existing units, or assemble a few different types of units	☐ MANY – there are no (or very few) existing units; everything must be assembled or built custom
There are swing spaces	☐ YES – there are sufficient swing spaces and they are close to the storage rooms	☐ YES – but they are few and / or far from the storage rooms	☐ NO – no room can be converted into a swing space; small swing spaces must be created within storage or in hallways
Budget is sufficient for purchasing needs	☐ YES – budget is sufficient		☐ NO – budget is insufficient

As a coach, you will also need to consider some aspects related to logistics:

I have team leaders to coordinate the work of smaller teams	☐ YES – I have 4-5	☐ YES – I have 1 or 2	☐ NO – I have none
I will require outside help or skills (carpentry, electrical work, other handy work, moving, cleaning)	☐ NO	☐ YES – but only for some things	☐ YES – for many projects
There will be RE-ORG communication activities during / after the project	☐ NO – or simple (e.g. one journalist)	☐ SOME – visits from officials	☐ YES – complex (e.g. developing an exhibition, organizing closing ceremony, a conference, or an activity involving the public)
TOTAL NUMBER OF CHECKMARKS:			

"I had to cancel a workshop because I underestimated the health and safety risks of working with a natural history collection including taxidermy and fluid-preserved specimens, which may contain several very harmful chemicals. There are definitely collection types that are perhaps less appropriate for the compressed timelines and 'organized chaos' of a RE-ORG workshop, or that require more preparation and health and safety training beforehand. Apart from natural history collections, those that come to mind are: military collections that contain edged weapons, munitions, ammunition or firearms, but also medical collections or science and technology collections that could contain radioactive substances."

"The storage spaces were located in the basement and in the attic (sounds familiar?) To make things worse, objects of the same category were spread throughout both locations. So, for five days we dealt with narrow staircases, small elevators and tight corridors. We overcame this by ensuring that there was good coordination between the teams working in the basement and the team working in the attic."

"I prefer to work in host museums that have no location system in storage (or one that is incomplete and can be disregarded) because I know that this will not slow us down during the three days we have for our workshops."

"Our host museum had storage spaces in 5 different locations: three on site, one about 1 km away and the last one 20 km from the museum. This project required a truck and a lot of preparatory work. Three truckloads of material were moved to the farthest location, which required that space to be reorganized beforehand. This is definitely not a typical project, and I would think twice about selecting that kind of project for a 3-5 day workshop."

1.2 RE-ORG quick diagnosis

For an internal RE-ORG project, a museum could spend a few weeks on Phase 2, analyzing the situation in their own storage. As the coach of a RE-ORG workshop, you do not have this kind of time. This quick diagnosis is meant to help you develop an overall strategy for planning the work to be done during the workshop and to optimize your time at the host museum. The details can be further refined as you approach the workshop date.

The first site visit (½ day to 1 day)

We recommend scheduling this site visit 4 to 6 months before the workshop, as there will likely be some exchanges between you and the host to collect missing information, develop a budget, as well as order supplies and equipment. The first time you do a quick diagnosis, you may want to spend a full day at the host museum, but after having done a few, half a day should be sufficient.

Ask the host museum to provide photocopies of any existing floor plans and bring:

- a device to take photos and videos of the spaces,
- a tape measure, and
- a notebook.
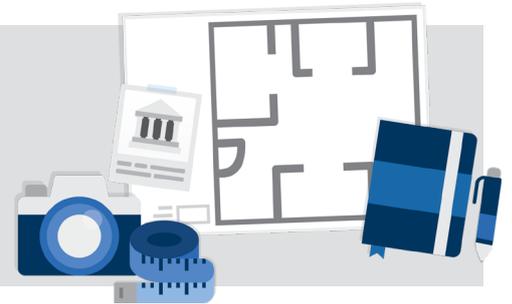
To make things easier, instead of drawing four separate floor plans, draw one floor plan with all the information contained in plans 1-4 (see below), including all the measurements. It does not have to be to scale; you can do this after the site visit. Use your time wisely.

See Coach's toolbox for "1.4 - Examples of quick RE-ORG plans".

Quick reminder: The 12 object categories

1. Extra heavy or voluminous objects, difficult to manipulate
2. Extra-long objects, not self-supporting (over 2 m / 6 ft)
3. Very heavy objects, self-supporting, requiring 2 people to manipulate (over 30 kg / 70 lbs)
4. Long objects, not self-supporting (under 2 m / 7 ft)
5. Heavy objects, self-supporting, can be carried by one person using equipment (10-30 kg / 20-70 lbs)
6. Light self-supporting objects that can be carried by one person, with two hands (0.5-10 kg / 1-20 lbs)
7. Small objects that can be held in one hand
8. "3-D" textiles
9. Objects that should be stored flat
10. Objects that can be rolled
11. Small 2-D objects (under 50 cm / 1.5 ft)
12. Large 2-D objects (over 50 cm / 1.5 ft)

Quick reminder: RE-ORG floor plans, by number
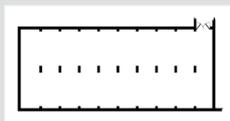
1. Empty storage floor plan	2. Fixtures plan	3. Storage furniture plan	4. Occupation plan	5. Proposed reorganization plan
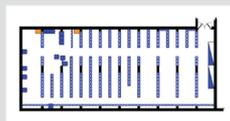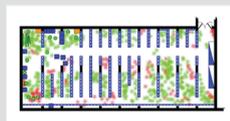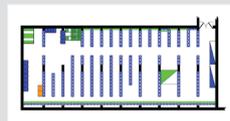
During the site visit: Reminders for coaches

| RE-ORG COMPONENT	ISSUES TO CLARIFY	WHY IS THIS IMPORTANT?	ADVICE
Information related to the RE-ORG project itself:			
Management	What are the host museum's expectations from the reorganization?	After the workshop, business will resume for the host museum, so whatever you do, it must be aligned with how they operate and use their collection.	Listen to them. Sometimes they will be unsure about what is feasible within 3-5 days because they have never experienced RE-ORG, but they will know what works well, what could work better, and whether they aspire to use their collection in new ways (e.g. organize storage tours, or other activities with the public). You must keep all of this in mind, in addition to the RE-ORG quality criteria and Self-evaluation Tool benchmarks, when developing your plan.
	Is there a clear collection scope? What is their level of understanding of what "collection" and "non-collection" means?	If the collection scope is unclear, you will likely find a large quantity of non-collection items during the workshop. It may also be difficult for collections staff to make decisions quickly about what is considered collection and non-collection. Left unresolved, this issue will be a bottleneck during the workshop.	As you walk through the collection storage rooms, evaluate their understanding by asking whether objects that seem to have an unclear status (from your external perspective) are collection or non-collection.
	Are they able to make purchases if needed (equipment, supplies), from their own budget or by applying for a grant?	If the budget is very limited and you anticipate needing to purchase some equipment (e.g. storage units) or materials (e.g. boxes, wrapping and packing materials, etc.), you may have to work with the host to obtain donations, find used equipment or build new units before or during the workshop.	Ask them whether they have a budget for this project. If so, how much? Ask them whether there are alternative sources of funding, or of supplies.
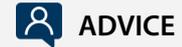
	ISSUES TO CLARIFY	WHY IS THIS IMPORTANT?	ADVICE
Management	What is the approval process for: • Changes to the location system? • Changes to the existing layout? • Regrouping objects from different collections? • Deciding whether objects are collection or non-collection?	You want to avoid finding out during the workshop that your plan requires the approval of someone who has not been involved, or that it will not be possible.	Sometimes, the RE-ORG project may include collections that fall under the responsibility of various curators, and negotiation may be required. As an external advisor, you have the advantage of not being involved in the day-to-day operations of the museum or in any of their internal politics. Use this to bring a fresh perspective that can benefit the museum's staff. You have a responsibility to make a proposal that improves the current situation. Your contact person at the host museum may be trying to bring about positive change, so you should support them.
Building & Space	Draw floor plans 1-4 with: • measurements of the spaces (including doorway width); • measurements of the storage units; • details on how doors into storage (and windows, if applicable) are secured.	During the site visit, you will likely not have time to develop a proposed storage layout plan (plan 5), but you must collect as much information as possible to plan the RE-ORG project when you no longer have access to the space – assuming you cannot revisit the host museum before the workshop.	Check the accuracy of any floor plans provided by the museum, and redraw if needed. Do not worry about making your plans to scale at this stage; you can work on nicer versions later. Instead of filling out a detailed inventory of existing storage units (RE-ORG Worksheet 4), write the unit measurements directly on your plan. You can calculate the floor space occupation by units (i.e. unit footprint) later.
	Which support spaces exist (prop storage, study room, quarantine, non-collection storage, etc.) and are they clearly demarcated?	Many host museums will not have clearly demarcated areas for these activities. RE-ORG is a good opportunity to clarify this to improve functionality and to regain space for the collection in storage.	Perhaps the host museum does not have these spaces, but would need them in your opinion. If feasible, you can propose to include this in the project and explain why it would be beneficial.
Collections	What types of non-collection items are there in storage, how much space do they occupy?	Usually, several non-collection items are removed from storage during the workshop. If the museum is keeping them, this will have an impact on your space planning, as you will have to find space elsewhere in the building to relocate them.	Visit every single room of the museum with your contact person and make them propose new locations (outside storage) for the kept non-collection items.

	ISSUES TO CLARIFY	WHY IS THIS IMPORTANT?	🗨 ADVICE
Collections	What are the specific object categories, the quantity of objects on the floor, the distribution of categories throughout the spaces and the outliers?	You need to know which object categories you are dealing with to be able to define your mini-projects and what materials, supplies and equipment you need for each. 🧰 See Coach's toolbox for *"1.5 - Example of a mini-project list"*.	Do not spend hours filling out RE-ORG Worksheet 6 counting every single object. Instead, define the object categories you see, and only count objects in categories that require a special storage solution (rolled, boxed, hung, supported in a special way, long, heavy, bulky, awkwardly shaped, especially fragile, etc.). For objects that fit in standard shelving, you can make a quick visual estimation to determine whether there is sufficient shelf space for all objects currently "not in units". If you miss anything during the visit, you can ask the host to provide the information afterwards.
	Do you need to keep track of locations during RE-ORG?	Keeping track of object locations as they are moved from one space to another implies creating a tracking sheet to record every object's accession number, its original location, and final location. If there are a few hundred objects, this could be feasible. If there are a few thousand objects, it will inevitably slow down the process, and will require careful planning to keep things moving. 🧰 See Coach's toolbox for an *"1.6 - Example of a location tracking sheet"*.	If this is your first RE-ORG workshop, or if your workshop is only 3 days long, select a host museum that does not currently have a location system. That said, keep in mind that even if there is a location system, it is often not functional (i.e. incomplete, too complex or unreliable) so it can be disregarded, if the host museum agrees to it.
Furniture & Equipment	What is the floor space occupation? Is it under or over 50%?	This gives you a quick idea about whether you can add more furniture in the space, given the current floor space occupation by units.	It is not necessary to calculate this now. You have your floor plan with measurements, so you can calculate it later.

CONTINUED ON NEXT PAGE ▶

ISSUES TO CLARIFY	WHY IS THIS IMPORTANT?	ADVICE
Information related to workshop planning and logistics:		
How to dispose of rubbish?	It is surprising how quickly rubbish accumulates. This could include garbage bags, but also large pieces of office furniture, old display cases, etc.	Ask the host museum to clarify how they will dispose of larger items (i.e. where to store them temporarily, how they will be picked up by the municipality).
What external support will we have?	Knowing that you have access to movers, carpenters, handy people will affect how you plan your mini-projects. For instance, if you have access to a carpenter during the workshop, you could design your own custom storage solutions instead of trying to find something in a store.	If possible, try to meet these people briefly during the site visit so they understand what you are planning to do during the workshop – in general terms and to confirm whether they have the capacity to help.
Who will participate from the host museum?	When you define the composition of your smaller teams, it will be useful to embed someone from the host museum in each team. They will help the participants navigate through an unknown institution.	You should only consider those who will be attending full-time. If some enter and leave the workshop, consider them as "extras" in teams. You want to make sure that progress is not compromised in those teams if someone has to leave.
Are the workshop spaces suitable? • Space away from collections (for participants personal belongings, coffee breaks, lunches): is it large enough? • Swing spaces: is there sufficient space?	This will help you decide the location of the various workshop activities and whether you need to make alternative arrangements.	Even at this early stage, think about where your various mini-projects could take place.
What is the plan for problem objects (i.e. no accession number, unclear status)? What is the plan for infested objects?	You will take this into account when you design your workflow and brief the various teams.	During a 3-5 day workshop, there is no time to treat infested objects. It may be possible to inspect suspicious objects and clean them minimally, but usually these will be bagged and tagged for later processing.
How is access to the spaces granted? (keys, alarm codes, etc.)	Coaches and team leads must be able to move freely throughout the facility during the RE-ORG.	Arrange access to spaces with the host museum ahead of time.
Are any other activities planned at the host museum during the workshop?	Understanding early on which other activities could conflict with the workshop or could affect the availability of host museum staff will help you to plan your schedule accordingly.	Host museum staff that enter and leave the workshop over the 3-5 days should not be counted when you are forming your teams.

See Coach's toolbox for a fillable version of *"1.7 - During the site visit: Reminders for coaches"*.

Be reassuring and build trust

In many cases, the initial site visit is the first time you will meet your contact person at the host museum, so you should be reassuring, positive, non-judgemental, and solutions oriented. RE-ORG projects cause many changes in a very short time span. Be mindful that some of these changes could make the host feel overwhelmed, for instance:

- many external people coming to work in their storage;
- participants / coach taking photos / videos of the conditions in storage (on this point, always ask for the host museum's permission to take photos and videos, and make sure they are comfortable with their intended use);
- changes to the location system;
- changes to the layout;
- changes to room functions.

Focus on creating a good working relationship with the museum and keep the tone informal. Make sure that you can count on them to do some work in between then and the workshop.

"There were so many non-collection items in the storage room, and so little clarity about what collection and non-collection were, that my team leaders and I assigned the host museum some work after the site visit: they had to identify with a sticky note everything that was 'collection', so we would not waste precious time during the workshop."

"We developed our proposed storage layout plan (plan 5) including an 'Alley of Wonders', a corridor wide enough for a group of 20 people. At various intervals along this corridor, we included cabinets that contained the most significant examples of the types of objects that were stored in that part of the room. Of course, this requires discussions about risk and value, and the challenges of balancing public benefit with conservation, but it is difficult for me to imagine doing a RE-ORG project now without including some kind of 'behind the scenes' aspect; it is our duty to constantly reinforce 'why' collections in storage are important."

"It was impossible to do a site visit, so I had to work from pictures, an empty floor plan (plan 1) and some videos to plan the workshop. This was very challenging. If I had to repeat the experience from the very beginning, I would require the host museum to fill out Worksheets 6 (a, b and c) as precisely as possible and to draw all 4 floor plans to scale. This would have made it much easier to plan the mini-projects and to prepare a layout proposal."

"The host museum had a functional location system. Objects of the same category were scattered throughout the building, but luckily, they were already grouped by size – more or less. We had a lot of swing space and tables. So, using masking tape, we created grids on the tables of the same size of the shelves. We identified each rectangle on the tables with the location code from the storage room, and identified shelves in the new storage layout with the same codes (temporarily). Even if we ultimately created a new location system, the museum could associate the old location code with the new location code, and update their database in batches by finding all the objects assigned to the old shelf location, and reassigning them to the new location."

"If the host is a larger institution, it becomes difficult to limit the RE-ORG to 1 or 2 storage rooms, especially if objects of the same categories are scattered throughout. When this happens, I try to focus the RE-ORG project on a few object categories or object types. For example, in one case, we said one room would be used to store large furniture and another room for glass and ceramics. We planned the workshop around these two object types, which meant regrouping all objects of these types into these two spaces – wherever they happened to be in the building when we started. It left some work for the host museum to complete afterwards, but they were quite motivated to continue."

"There were so many objects of unclear status or that were unaccessioned that it made no sense to isolate them, as the storage room would have been mostly empty. Using sticky notes, we visibly labelled the objects that the museum was pretty sure would be accessioned and reorganized the space as if these objects were accessioned. Since they were identified, the museum could go back after the workshop and accession them. When there are only a few unaccessioned objects, we can group them on one shelf, or in one unit."

Duty to inform host museum about potentially high risks

Although it is not the primary purpose of your visit, some smaller institutions rarely receive visits from collections care experts, so it is important to make them aware of risks that may be affecting their collection, e.g. floods, fire, earthquakes, major security weaknesses, active mould / insect infestations, etc.

For the purposes of the RE-ORG workshop, you must consider how these risks can be reduced through the RE-ORG project.

"We were in a high seismic area, so we made sure to bolt the storage units together and the host museum then installed lips on the shelves to prevent objects from falling off the shelves in the event of an earthquake."

"We modified the main access route into storage to address some security weaknesses. We condemned one of the doors into storage, as it led to a part of the building with less surveillance. Then, we installed a new door to exclude a section of the storage room that had a utilities panel and would have otherwise required maintenance staff to go into the storage room periodically; we converted that small area into a study room for researchers."

"We opted not to install sliding racks close to a wall because we could see evidence of past water leaks from above, and were not sure that the source of the leak had been addressed. Even though we could have gained a lot of space, it would have made that whole area unreachable, should the leak have occurred again."

"We were afraid of a possible flood occurring over the weekend, so we built a temporary physical barrier to protect collections that were still on the floor. Heavy rains were being announced and the museum had experienced flood issues before. We did not sleep well that weekend."

"It is common to find objects infested with pests during the workshop; these are always bagged and isolated for future conservation treatment. However, in one workshop, the objects were not the problem. As we were working, we discovered that all the wooden cabinets used to store the objects were infested. All of them had to be discarded and replaced with metallic open shelving; this was a significant cost we had not budgeted for."

Making your diagnosis

The diagnosis, which emerges from your site visit, should allow you to make clear decisions about the workshop parameters:

- What is the project scope, i.e. what to include as part of the project and what to exclude? This is based on your assessment of what is feasible in the time that you have. It is preferable to add mini-projects during the workshop if you see that the work is progressing more rapidly than you expected, as opposed to planning for too much and leaving the project incomplete.
- What are the mini-projects? What materials and equipment do you need for each? Which object types / categories need custom solutions? Are any special skills required for any of them?
- Is external help needed, and if so, for what? Moving large objects? Building custom units? Other handywork?
- Is extra storage furniture needed (what type(s) and quantity)?

Make sure that what you are proposing will not introduce new risks (e.g. dissociation, fire, flood, pest, mould) and that it will address existing risks, if feasible.

"Whenever there are building renovations to do (e.g. relocating a light switch because it is inconveniently placed, installing new light fixtures to improve visibility, building and / or removing a partition to increase the storage floor space), I make sure the host takes care of this between the site visit and the workshop. During the workshop, there is too much going on. This only applies to renovations that can be done while keeping collections protected and safe."

"Estimating storage furniture needs is always the tricky part of any RE-ORG, so the way I approach it is the following. Using a floor plan that I create using something as simple as PowerPoint, I situate all the outliers and object categories that go in anything but standard shelving. If those need special units that the host does not have, I make note of it. Then, whatever floor space is left over on the plan, I fill with shelving. If the host museum's shelving is still usable, I place it on the plan first. If the available floor space is really limited, then I use a type of wire shelving that fits on tracks (a cheaper compact shelving option for lighter objects). I play with the layout until I get the highest floor space occupation, while still maintaining aisles wide enough for safe object retrieval. The new units I added becomes my list of furniture to buy, to find, or to build."

1.3 Period between the site visit and the workshop

Between your initial site visit and the workshop, there is a lot of planning to do! But do not worry, you are not alone. The host museum and the organizer will work with you. It is sometimes useful to set up an agreement or memorandum of understanding (MoU) to define respective responsibilities. The checklists in this section can be used for that purpose.

What is expected of the coach

☐ Work with the host to finalize the proposed storage layout plan (plan 5).

☐ Work with the host to finalize the mini-projects list, which includes material and equipment needs. The host museum or its board members sometimes have equipment and tools that you can borrow, otherwise, you will have to find them somehow in collaboration with the organizer. Remember to include personal protective equipment (PPE) for the participants.

☐ Obtain confirmation from the host about:

☐ their budget for the project, and whether any donations are likely;

☐ how many of their staff or interns would participate (only those participating full-time);

☐ starting time in the morning; ending time in the evening;

☐ whether there would be any activities happening during the workshop that may affect the participation of the host museum's staff or that may interrupt the work;

☐ whether any officials or members of the press would be coming during the workshop and when.

☐ Obtain confirmation from the organizer about:

    ☐ catering arrangements (who is taking care of it? what time are the breaks scheduled?);

    ☐ participant selection (how many, from which institutions, their title or background).

☐ Ensure that materials, supplies and equipment are ordered on time and will arrive in time for the workshop.

☐ Determine who will document the process during the workshop using photo and video (e.g. organizer, host museum, team leaders, an intern?).

☐ Develop the workshop schedule.

    🧰 See Coach's toolbox for *"1.8 - Example of a workshop schedule"*.

☐ Prepare your participants. Ideally, participants taking the workshop would have already started exploring Phases 1-3 before the workshop, either by reading the RE-ORG Method or by using it to start planning a project of their own in their institution. At the very least, the participants should review RE-ORG Fundamentals: Introduction to the RE-ORG Method (video) and look at some of the RE-ORG project videos.

⚙️ **Resources to help you develop your proposed storage layout plan (plan 5) and mini-project list**

- RE-ORG Worksheets: Worksheet 2 - *List of materials and tools for storage reorganization*
- Mini-project list
  - 🧰 See Coach's toolbox for *"1.4 - Example of a mini-project list"*.
- Collections Storage Tips and Tricks - Visual resource created by ICCROM and CCI with custom solutions created by past RE-ORG participants around the world using readily available materials.
- RE-ORG Additional Resources
  - Resource 2 - General floor loading requirements
  - Resource 4 - Products and materials for storage
  - Resource 5 - 50% rule options
  - Resource 6 - Maximum floor space occupation by unit type
  - Resource 8 - Main collection vulnerabilities
  - Resource 10 - The 12 object categories
- Museum storage (RE-ORG) - Pinterest board created by Jeanne-Mance Cormier (Canada) with ideas found online on how to store various types of objects.
- STASHc: Storage techniques for Art, Science and History - Provides information and tools on how to create safe and appropriate storage solutions, step-by-step.
- Canadian Conservation Institute (CCI) Notes - A few of these resources focus on creating storage solutions for specific types of objects.
- Conserve O Grams (National Parks Service, NPS) - A few of these resources focus on creating storage solutions for specific types of objects.
- Museum collection storage (UNESCO) - A classic resource that contains illustrations of various storage systems for different types of objects.
- RE-ORG International YouTube channel - Contains videos describing RE-ORG workshops, tips and tricks and various recordings from past RE-ORG mini-conferences.
- Websites of various shelving suppliers
- Guide to Risk Management (ICCROM) - An introduction to the ABC risk management method, which includes tools that you can use to identify risks to collections in a more systematic way.

Regular check-ins with the host during this period are really important to agree on a future layout option (plan 5), to finalize the list of materials and equipment needs, and to check their order status to make sure everything has been received before the workshop.

"Whenever I work with a host after the site visit, I always develop at least two proposed storage layout options (plan 5) for them to look at. It is so important to make them part of the decision-making process to keep them engaged and to ensure that what I'm planning will work for them."

"It is always good to have several options ready. In a recent workshop, the director agreed to finance new furniture, boxes and equipment but without giving an exact amount. We provided 3 options and the cheapest one was chosen. Luckily we received this information in time for us to adapt the project and the workshop schedule based on available resources."

"We had no budget and were working entirely from donations. A local hardware store seemed interested in donating shelving but a few days before the start of the workshop, we still did not know whether or not we would receive them in time. Our Plan B was to contact local online sellers to request donations; and Plan C was to only work with the equipment that the museum already had. It is always wise to have a few backup options."

What is expected of the host

☐ Provide missing information to the coach (measurements, anything that was unclear at the time of the site visit).

☐ Order the materials and equipment, and ensure everything is received in time for the workshop.

☐ Complete any agreed upon construction or renovation of the spaces before the workshop (e.g. building or removing walls, doing electrical work, relocating light switches or lighting fixtures, fixing broken windows, fixing leaks, etc.).

☐ Provide information to the coach and organizer about:

    ☐ any officials or members of the press that are coming and when;

    ☐ how many of their staff or interns will participate (full-time / part-time);

    ☐ any activities that may interrupt the work of the participants, or that may draw them away from the workshop at any point;

    ☐ catering arrangements.

☐ Label collection / non-collection items (e.g. with sticky notes) if there were many objects whose status was unclear during the site visit.

☐ Complete Worksheets 6 (a, b and c) and draw plans 1-4 if a site visit was not possible.

☐ Finalize the catering arrangements, if not handled by the organizer.

What is expected of the organizer

☐ Announce the workshop.

☐ Select the course participants, if applicable.

☐ Inform the coach and host museum of the selection.

☐ Work with host to prepare a press release to invite local media to the workshop and / or closing ceremony, if appropriate.

☐ Finalize the catering arrangements, if not handled by the host museum.

RE-ORG workshop communications toolkit

Storage is still a taboo topic for many museums, but all institutions face the same challenges. By talking about these challenges openly with the public, we will raise awareness about the issue and create allies in the community. The organizer, in collaboration with the host museum, may want to spread the word by using:

- a press release, to invite local journalists;
- social media and / or newsletters, to let the community know about the project;
- a final ceremony, to mark the successful completion of the workshop.

To advertise a RE-ORG workshop, the organizer will need:

- a workshop announcement; and
- a workshop application, if participants are being selected.

See Coach's toolbox for:
- *"1.9 - Example of a press release"*,
- *"1.10 - Examples of social media posts and newsletter articles"*,
- *"1.11 - Examples of final ceremony invitations"*, and
- *"1.12 - Examples of workshop announcements"*

Put your stamp on your RE-ORG workshop!

☐ Develop your own RE-ORG flag and take a group photo with your participants

☐ Create some promotional materials (pins, badges, etc.) to make the event feel special

☐ Create course certificates so participants can show that they have participated in the professional development activity

☐ Have a social media presence during the RE-ORG; develop a hashtag, create posts and live events as the work unfolds

☐ Create a poster or develop a talk and present it at a professional conference

See Coach's toolbox for a presentation showing
"1.13 - Examples of how to personalize your RE-ORG workshop".

1.4 Final planning – immediately before the workshop

You may feel a little uncomfortable to leave your final planning to the last minute, but there are good reasons to do so. Host museums have kept operating since your site visit, so there may be new acquisitions, they may not have had the time to complete the tasks you assigned to them, or they may have done some cleaning up. If you are physically close to the host museum and can travel there, you can do this final planning the week before the workshop, but if you have to travel to get there, it can be done the day before the workshop – do not worry, it can be done!

At the host museum (½ day to 1 day)

TO DO	🗨 ADVICE
☐ Walk through the spaces to see what has changed since your initial visit.	Focus on changes that will impact the required tasks for each project. Make sure that hallways and swing spaces are clear to make it easier to move objects (unless you are including this as one of the first tasks the participants have to do themselves).
☐ Confirm that all required materials and equipment have been received.	Make a list of last minute supplies that you still need to get. There are often last minute trips to the hardware store.
☐ Generate individual tasks for each mini-project and organize them in chronological order.	Take advantage of the fact that you are onsite to work with the host museum staff (and your team leaders and assistant if you have them) to identify the single tasks that need to be accomplished to complete each mini-project. Where practical, leave certain problems unresolved (i.e. "find a solution for large sculptures") to encourage participants to solve problems on their own. Use sticky notes (one task per note). With your colleagues, organize the sticky notes in chronological order on a large sheet of paper. Determine which tasks depend on others, and which tasks can happen simultaneously. You will use this preliminary sorting of tasks to draw the tracking chart. 💼 See Coach's toolbox for a presentation on *"1.14 - Developing a tracking chart"*. ⚙ RE-ORG Additional Resources: Resource 14 - Simple steps to creating a RE-ORG tracking chart.
☐ Decide where you will hang your RE-ORG tracking chart. If you prefer, you could also create a simple checklist for each mini-project or smaller team.	Ideally, on a free wall located where participants will see it, and be encouraged to update it. If no such wall is free in your working areas, you can hang it in your eating area.
☐ Set-up the tools and materials table.	This is really important, especially since so many people will be working simultaneously. ⚙ RE-ORG Workbook, Phase 1, step 7

TO DO	ADVICE
☐ Identify the various working areas and swing spaces.	Decide where each mini-project will be worked on and identify the working areas with a recognizable name (e.g. "props room", "storage A", "archives storage", that you will then reproduce on your large floor plan (see below). Setting up the rooms for the work can also be part of that team's first tasks. ⚙ RE-ORG Workbook, Phase 1, step 3
☐ Take photos of BEFORE the RE-ORG: ☐ general views inside the storage room(s) taken from the corners looking towards the centre; ☐ general views inside the storage room(s) taken from above (e.g. standing on a ladder); ☐ general views inside the storage room(s) taken with your back against the door(s) looking towards the centre, and looking towards the door(s) from the centre. ⚙ RE-ORG Workbook, Phase 1, step 8	Make a mental note of where you were standing when you took the photos, and make sure you take photos from the same spot several times during the RE-ORG, and at the very end. This will give you some really powerful before and after photos.
☐ Make a walkthrough video of BEFORE the RE-ORG.	This can be done even using a smartphone. This will be very useful for presentations afterwards.

After you have left the museum

TO DO	ADVICE
☐ Write the workshop objective.	Keep it clear and simple. ⚙ RE-ORG Workbook, Phase 1, step 4
☐ Decide how many people are needed for each task and identify possible bottlenecks.	Some tasks need more people than others because they are more complex, or because they need to be completed more quickly to prevent bottlenecks. Assembling or dismantling storage furniture, or tracking object locations are typical bottlenecks. On the sticky notes you created earlier, indicate how many people you need next to each task. This will be helpful when forming your smaller teams at the beginning of the workshop. As a coach, you may worry about keeping the project scope under control. If you see that you need more people than you have, you will have to reduce the amount of tasks happening simultaneously (e.g. 4 teams instead of 6), or consider identifying certain non-essential projects as "optional". These can be added later if there is enough time.

TO DO	ADVICE
☐ Draw the RE-ORG tracking chart.	A tracking chart will provide all your participants with a clear overview of everything that will happen during the 3-5 days. For some projects, you will be able to use the same tracking chart until the very end. However, in many cases, it will need to be redesigned at the end of day 1 and 2 because some tasks may take more or less time than anticipated, some teams may run out of things to do, etc. Sometimes, you will find that a simple checklist works better (one per team). Use the tool you are most comfortable with to track the progress of the project and to allow participants to understand the "big picture" at all times. Using a different colour for each team will make it easier for participants to identify themselves with a particular team. Contrary to a tracking chart for an internal RE-ORG project with a smaller team, here you can have more teams working simultaneously, which will make the work progress more rapidly. However, this also requires a more skilful choreography. Typically, in a workshop with 15-20 participants, 4 to 6 teams will be working simultaneously. This varies depending on the project. See Coach's toolbox for a presentation on "1.14 - Developing a tracking chart". RE-ORG Additional Resources: Resource 14 - Simple steps to creating a RE-ORG tracking chart
☐ Determine special skills needed in different projects.	Look at your tracking chart and list any special skills that may be needed for each. You will need to keep this in mind when forming the smaller teams. RE-ORG Workbook, Phase 1, step 6
☐ Decide in which teams you will embed staff from the host museum.	Ideally, each team should have at least one staff member from the host museum. They will be able to orient the team, as it will mostly comprise of people who are not familiar with the institution. If there is a smaller team in which many important decisions must be made about the status of objects, or in which negotiations with other decision makers are necessary, it would be wise to embed your host museum contact person in that team. Since that person is usually quite solicited by the other teams, you could also decide to not embed that person in any specific team, but rather to keep them available to answer questions, especially during the first day. As a coach, you will usually not include yourself in a team, at least during the first day. You must be able to float around to monitor what is going on in the various teams.
☐ Draw large BEFORE and AFTER floor plans on large format paper (e.g. flipchart paper).	To help participants orient themselves and visualize the end result, it is useful to have large floor plans: • Floor plan 3 "Storage furniture plan" (one for each storage room) • Floor plan 5 "Proposed storage layout plan" (one for each storage room) These can be hand drawn, but should include the same names you gave to the various rooms ("storage A", "archives storage", etc.)

Always be mindful not to introduce new risks (dissociation, fire, flood, pest, mould, security) and ensure that you are addressing existing risks, as much as possible for a project such as this with a compressed timeline and a narrow scope.

Once you have your tracking chart or mini-project checklist, ask yourself "what could go wrong?", and then "what can I do to address it?". What is your plan B?

"Instead of creating the mini-project checklists for the smaller teams, I get them to develop their own daily work schedule that lists their tasks, estimated time for completion and names of the team members assigned to each task. I have also found it useful to have an idea of where people could be reassigned if they finish their tasks early. During one workshop, we reassigned people from one team to another, especially when there were more complex tasks taking place."

2. During the workshop

The big day has arrived! Take a deep breath… everything will be ok. You have done all the planning you could. Now it is time to see that plan materialize. It is perfectly normal to have to adjust your plan along the way. In fact, it would be strange if you did not.

2.1 Your role

Your participants may have varying levels of training, so your role as a coach is to make sure that:

- everyone understands what needs to happen and where;
- everyone has the necessary skills and knowledge to do what is being asked of them;
- you know what is happening and where – especially on day one and during delicate operations;
- bottlenecks are identified and corrected quickly;
- each team has what they need to do their work (sufficient materials, sufficient people);
- everyone takes breaks;
- the atmosphere remains collegial and friendly at all times;
- you are a resource, not a micromanager.

2.2 Your responsibilities

As a coach, you have responsibilities towards the organizer, the host museum and the participants simultaneously. You must ensure that:

- you are attentive to the host museum's concerns, specifically:
  - by monitoring their stress levels. Having to make so many decisions about non-collections (keep, discard, donate) can be overwhelming. In addition, they are not used to having so many people handling their collection.
  - by ensuring a constant flow of communication. Keep your host museum contact person engaged, involve them in any decision that deviates from the initial plan, and brief them regularly on the progress of the various mini-projects.
- a certain quality standard is maintained in the end result for each team;
- the entire process is documented (photo / video);
- participants behave ethically and respect the wishes of the host with regards to taking photos, sharing images on social media, procedures surrounding culturally sensitive collections, etc.

Health and safety

RE-ORG projects sometimes feel like construction sites, so everyone should be vigilant and not do anything that could cause injury to them or their teammates. It is useful to name a "health and safety officer" in each team who has the specific responsibility to keep watch. Everyone must be made aware of potential health and safety hazards and everyone must have the appropriate personal protective equipment (PPE). Always wear protective gloves and take all necessary precautions when handling unknown objects, as collections may contain potentially dangerous or hazardous substances that can pose serious health and safety risks: taxidermy specimens containing arsenic, mercury and / or lead; edged weapons; munitions; unexploded ammunition; medical objects; drugs or chemicals; objects containing asbestos; objects treated with pesticides; and cellulose nitrate film.

Handling collections

Ensure that everyone knows how to safely handle collections to prevent damage. Depending on the level of training of your participants, you may not have to make a formal presentation. You could simply ask them on day 1 to list a few collection handling principles. Those who may have less hands-on experience with collections will benefit, and the host museum will be reassured that everyone has been informed.

2.3 Coaching strategies

- **Keep it informal.** Establish an informal atmosphere from day 1.
- **Be extremely clear about your expectations.** Use the tools you have to communicate: the project objective, the tracking chart / checklists, before and after plans.
- **Be the connector between the various smaller teams.** During the workshop, you will be the only one who has an overall view of the project. As you circulate from one team to the other, it is useful to remind participants of how their work is connected to that of the other teams, and to give them quick progress updates.
- **Reinforce team identity.** You could have all participants in a given team wear something of the same colour, or have them develop an original name for their team, even if the team composition changes over the duration of the workshop.

- **Debrief regularly.** It is useful to start every day with a 5-minute meeting to remind the participants of the plan for the day, especially if you had to modify your tracking chart or checklists overnight. Depending on the complexity of the project, it may also be useful to have these quick team meetings 5 minutes before lunch. At the end of the day, a more detailed debrief with everyone present can clarify:
    - the progress of each team;
    - whether there are unexpected challenges or bottlenecks (brainstorm solutions immediately);
    - whether any team needs more people or whether they have too many people for the next day's tasks.
- **Incorporate team building activities into the workshop.** Organize an initial icebreaker on day 1, plan an evening social event, eat lunch together, etc.
- **Engage participants in finding solutions to problems themselves.** You are leading a project with collections professionals who will likely implement a project of their own, so they should have opportunities to practice leadership and decision making skills during the workshop.

It is not always easy for participants who may focus on individual objects in their day-to-day work to think on the scale that RE-ORG requires. It is your responsibility as a coach to ensure that participants stay focused on the very specific objective of the RE-ORG workshop, which is not to achieve perfection, but improved access and visibility of the collection. Detailed object rehousing work, treatment or decisions about individual objects can occur after the workshop, i.e. once the pace has slowed down and staff of the host museum have more time to think about what their collection needs.

For multilingual groups, it is useful when there is at least one language that everyone understands, but here are some tips:

1. Create your smaller teams with people who speak the same language. This makes the work run more smoothly and progress faster.
2. Spend more time on communication: explanations, debrief sessions, etc.
3. Create a list of common terms (e.g. shelf, unit, rack, bay, collection, non-collection, etc.) on a large sheet of paper. Write the terms in the most commonly understood language and ask the participants to provide the equivalent term in their own language.
4. Give each participant a set of coloured cards (green and red), and when you are explaining something, ask them to vote on whether they understood (green), or not (red).
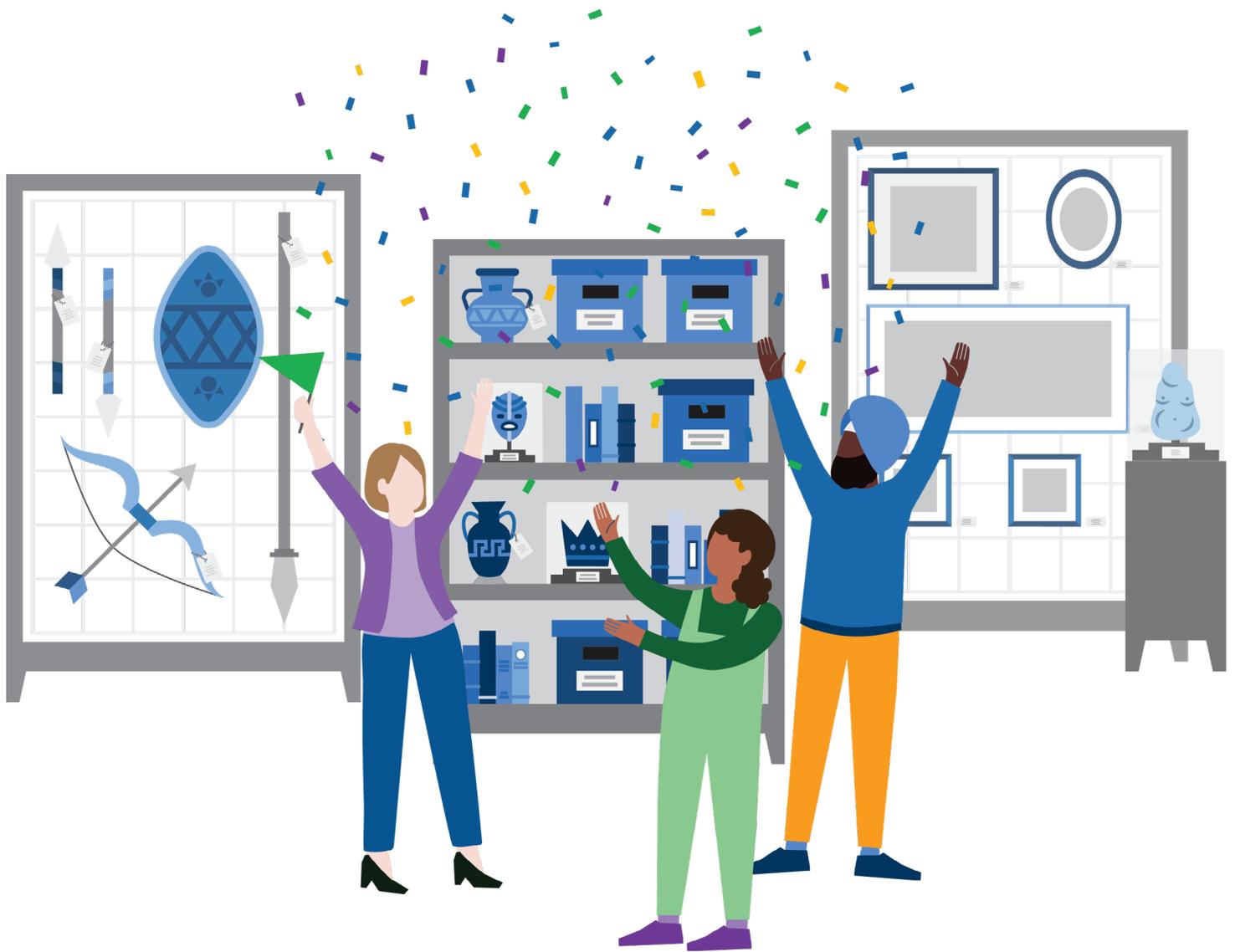
3. After the workshop

Congratulations… You made it! But wait… it is not over yet.

3.1 On the last day

☐ Provide the host museum with a list of follow-up tasks, if applicable. There may be some things that you were not able to finish, so having a short "to-do" list will be very useful to them. You could also ask the host museum staff to draw up this list.

☐ Take photos of AFTER the RE-ORG:

    ☐ general views inside the storage room(s) taken from the corners looking towards the centre;

    ☐ general views inside the storage room(s) taken from above (e.g. standing on a ladder);

    ☐ general views inside the storage room(s) taken with your back against the door(s) looking towards the centre, and looking towards the door(s) from the centre.

☐ Make a walkthrough video of AFTER the RE-ORG.

☐ Distribute certificates to the participants, either right after the work is complete, or during the closing ceremony if one is being organized.

🧰 See Coach's toolbox for *"3.1 - Example of certificate"*.

3.2 A few days later

☐ In collaboration with the organizer, evaluate the workshop. This can be done using free online survey software, or by email. It is useful to give participants a few days to reflect on the experience, as everyone may be quite tired immediately after the workshop.

☐ Prepare a presentation that explains the process and describes what was accomplished during the workshop. Share the presentation with the participants and the host museum.

🧰 See Coach's toolbox for *"3.2 - Template for RE-ORG presentation"*.

3.3 A few months later

☐ Check in with the host to see how they are doing and if they are facing any issues that you could provide some quick advice about; and share photographs of the workshop with them.

☐ You may want to survey participants 6 months to 1 year after the workshop to see what they have been able to achieve after the workshop.

Use your collections! Ideas for host museums

For many museums, the conditions in storage were preventing them from using their collections; now that they are accessible, they can be used for a range of activities to engage the local community:

- Storage visits (local community, press, officials, directors, etc.)
- Activities for school children (e.g. drawing contest, visits)
- Study day / conference
- Special presentation for a "friends of the museum" association
- Temporary exhibition featuring objects found during the RE-ORG
- Media coverage: Interviews, articles, social media

For additional ideas:

- SHA*RE-ORG*
- Behind Closed Doors toolkit

Notes